

How To Create a Web Payment Form

You can configure your online payment form for any payment type you accept, including recurring payments, and you can attach the form to a **Payment Button** for your website or with an electronic invoice.

You can customize the form and log-in page with your company's branding; presenting the look and feel of your website. This payment form allows you to create a unique page for individual events, products, or services your company offers.

To add a payment form template:

1. Log into the system at <https://secure.paysimple.com>
2. On the main navigation bar, click **System Management**.
3. Click **Payment Forms**.
4. Select **Add New Template** and the **New Payment Form** page appears.
5. Define the following information, indicated with asterisks (*):
 - **Form Name:** Your reference name for the form
 - **User Name:** The user to whom all new customers created via this web form will be assigned. Existing customers will retain their originally assigned user. Note that the Payment Processing Limits (payment method and/or dollar value), assigned to this user governs the payment processing limits available on that form. For example, if user 'Jsmith' is assigned to this form and can only process transactions up to \$100, none of your customers can use the form to process a transaction for \$101 or more.
 - **Description:** A brief explanation for your own reference.
 - **Payment Method:** Depending on how your system is enabled, you can select ACH, CC (with individual card types), or both.
 - **Invoice #:** Required for all Credit Card transactions in order to qualify for the lowest rate. If no invoice number is entered, the system will automatically enter "101" in the field. You can set the invoice # as a hidden field if you don't want it to appear.

6. **Recurring Schedule Options** enables your customer to set up either **Bill Payment** or **Payment Plan** as a recurring schedule
7. With the **Recurring Schedule Option** chosen, you can allow an **Initial First Payment** or disable that feature.
8. **Terms & Conditions** is required. Be sure to include full terms of sale here, including all language required to authorize web-initiated transactions.
9. The **Additional Fields** section can be used to add any field in the system attached to the Customer record, including custom fields you create..
10. In the **Form Customization Information** section, define
 - a. **Form Title**, which is the title that displays on your payment form
 - b. Upload your **Form Logo**, which appears at the top of your payment page. It must measure exactly 780 pixels x 90 pixels and be in RGB .gif or .jpg format. Leaving this field blank will result in your form using the default logo.
 - c. **Return Page Text** is the text that appears at the top of the receipt page attached to the **Return Page URL**, such as “return to my site.
 - d. **Return Page URL** is the link to the page you want your customer directed to after their payment has been made. For example <http://www.mysite.com>.
 - e. **Payment Button Text**. This is the text you want to appear on the submit payment button. Note that this text is different from the “Payment Button” text you create to link a web page or email to this form.
11. Select fonts and colors for your payment form
 - a. Select a font for your form from the list.
 - b. Select the **Form Colors** (which can be previewed after saving) by clicking the **Choose** link for each form component and selecting a swatch from the palette. If you know your company colors, you can type a HEX value (i.e. #FFFFFF) into the color field.
12. Configure your **Login Page**
 - a. Select and upload your logo in the “Login Logo” field. It must measure exactly 128 pixels x 32 pixels and be in RGB .gif or .jpg format.

- b. Select an accent color for the login page by clicking the **Choose** link to view the palette, or enter a HEX value.
- 13. In the **Contact Information** section, define the information that you want to appear on your payment form and on the receipt page that is generated for you customer. The fields with a red asterisk are required for your payment confirmation page.
- 13. Click on **Create Form Template** and the **Payment Forms Page** appears, displaying the new template form in the template list.

To preview the payment page, click on **Form** in the **Preview** column. To preview the login page, click on **Login Page** in the preview column. Note that you CANNOT copy the URL from the preview form or login page and use it in your web pages—it will not enable a payment to be processed.

To link your Payment Form with your website for customers to process payments, you can copy the link in the **Link** column and paste it into any website. For html novices, PaySimple also offers an easy way to export graphic buttons with and paste the button into any website or email. See **How to Create Payment Buttons**. To send payment forms with invoices from PaySimple Solution 2.0, see **How to Invoice Your Customers using the PaySimple Solution 2.0**.

PaySimple Support: 800.466.0992